

# Preparing your 1099-NEC & 1099-MISC for printing and mailing

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## Preparing your 1099-NEC & 1099-MISC forms for printing and mailing

### Verify Agency's Profile

- Your agency TIN
- Your Agency NAME
- Your Agency Address
- Your Agency Contact Person for 1099-NEC & 1099-MISC: Name, Phone Number, and Email address

Please email the OFM Help Desk at [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov) of any changes to your Agency's Profile information. OFM will update your agency profile so your agency contact information shows correctly on the 1099-NEC & 1099-MISC forms.

### Verify Recipient's Profile

Please **navigate** through each 1099-NEC & 1099-MISC forms and ensure that the Recipient profile exist and valid:

- TIN
- NAME
- TAX TYPE
- Address
- Zip code

If any part of the Recipient profile is incorrect, please **correct** the 1099-NEC & 1099-MISC records in Account Ability.

### Verify Amounts

Verify that each 1099-NEC & 1099-MISC forms has the correct Amount and populated in the appropriate IRS Box:

- Correct Dollar Amount?
- Appropriate IRS Box?

**Taking into account Electronic Funds Transfer (EFT) payments processed on last two-business day of the calendar?**

<b>Action for Calendar Reporting Year 2021</b>	<b>EFT Release Date (Day 1)</b>	<b>EFT Payment Process Date (Day 2)</b>	<b>Deposit Date (Day 3)</b>
Add to	Wednesday 12/30/2020	Thursday 12/31/2020	Monday 1/4/2021
Remove from	Wednesday 12/29/2021	Thursday 12/30/2021	Monday 1/3/2022

**Manually track EFT reversals and make appropriate adjustment to current year's 1099-NEC & 1099-MISC**


For example:

If you incorrectly paid vendor "A" \$5000 and later did an EFT reversal (within 3-4 business days from payment date) or EFT Returned of this \$5000, the 1099-NEC & 1099-MISC will show \$5000 paid to vendor "A".


You will need to remember that you did an EFT reversal or return and manually backed out this \$5000 EFT reversal/return, as vendor A should not be receiving a 1099-NEC or 1099-MISC form.

## Browsing Returns


The following are navigation buttons for browsing through the returns.





**Browsing Returns** within a Client (Agency) – Browse mode is indicated by the browse icon appearing next to the reporting year on the tax forms.





**Browse Buttons:** Navigation first, back, forward, last


Moves to the first form in client's list of forms.



Moves to the previous form in client's list of forms.


Moves to the next form in client's list of forms.







Moves to the last form in client's list of forms.



[1099-NEC & 1099-MISC] Locate a recipient [F5] – This function will allow you access to the Shared Recipient Database.



[1099-NEC & 1099-MISC] **Delete** recipient (Ctrl+Del) (with confirmation)

	<b>Client (Filer) Management</b> <div style="position: relative; height: 40px;"> <div style="position: absolute; top: -20px; left: 50%; transform: translateX(-50%); border: 1px solid black; border-radius: 50%; padding: 5px; background-color: white;">                     OFM supports  <b>1099-NEC &amp; 1099-MISC only</b> </div> </div>
	<b>Active Forms</b>
	<b>Add</b> a new recipient [Ins] (with automatic insert)
	[1099-NEC & 1099-MISC] <b>Save</b> Changes [F8]
	[1099-NEC & 1099-MISC] Cancel Change (Ctrl+F8, Esc)

07\_Print\_and\_Mail\_in\_Account\_Ability  
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## Delete blank forms

Sometimes Account Ability creates blank 1099-NEC & 1099-MISC forms. Please navigate through each form to spot blank 1099-NEC or 1099-MISC form. Please **delete** the **blank 1099-NEC & 1099-MISC** forms from Account Ability.

VOID all forms with amount less than the dollar amount threshold

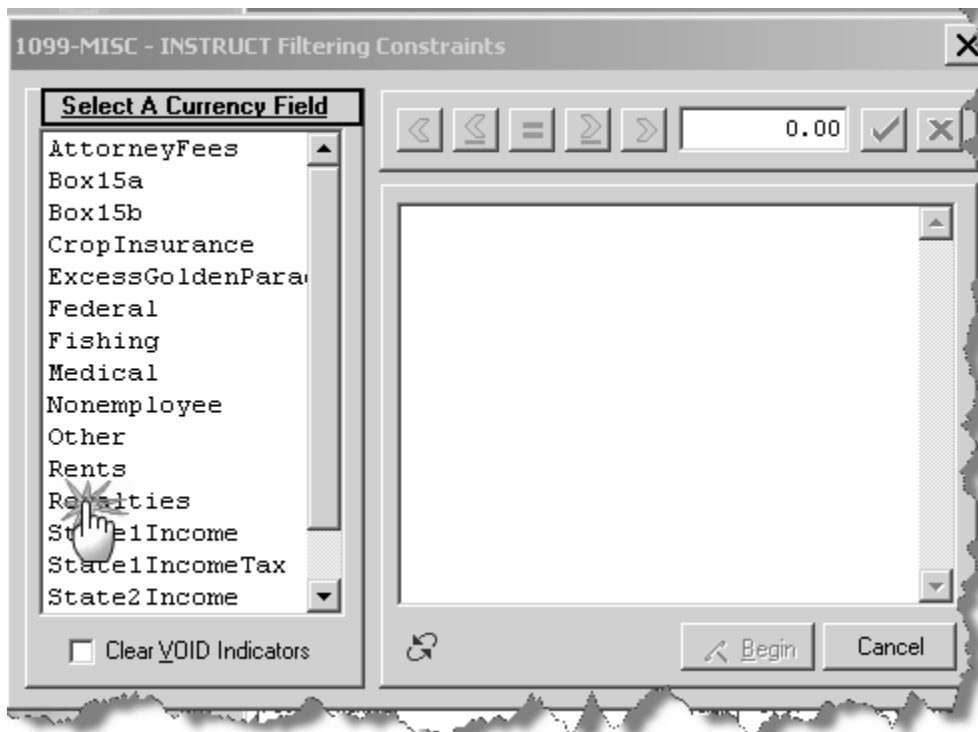



You will want to **VOID** all 1099-NEC & 1099-MISC that do not meet the dollar amount threshold. Please check with the Internal Revenue Service (IRS) on guidelines regarding category and amount threshold for 1099-NEC & 1099-MISC reporting.

1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency.
3. Click "**Tools**" and then "**Filtering**"

4. In the **“Select a Currency Field”** section of the Filtering tool, *Click* on an IRS type {for example Rents}

For example, the reportable amount for **“Rents”** is amount equal to or greater than \$600.



In this example, you would select **“Rents”** in the **“Select A Currency”** Field section, then in the operator section, select the **“less than”** operator  and enter **“600.00”** in the amount field.

1099-MISC - INSTRUCT Filtering Constraints

**Currency Fields**

- AttorneyFees
- Box15a
- Box15b
- CropInsurance
- ExcessGoldenPara
- Federal
- Fishing
- Medical
- Nonemployee
- Other
- Rents**
- Royalties
- State1Income
- State1IncomeTax
- State2Income

☐ Clear VOID Indicators

< ≤ = ≥ > 600.00 ✓ ✕

Begin Cancel

5. Click on the green checkmark  to **save setting**.

6. *Continue* amount threshold setting for the rest of the IRS type amount.

**Select A Currency Field**

- AttorneyFees
- Box15a
- Box15b
- CropInsurance
- ExcessGoldenPara
- Federal
- Fishing
- Medical
- Nonemployee**
- Other
- Rents
- Royalties
- State1Income
- State1IncomeTax
- State2Income

☐ Clear VOID Indicators

< ≤ = ≥ > 600.00 ✓ ✕

Rents < \$600.00  
Royalties < \$10.00  
Other < \$600.00  
Nonemployee < \$600.00

Begin Cancel

7. When you are done with all your amount filtering, *Click **Begin**.*

Select A Currency Field

AttorneyFees

Box15a

Box15b

CropInsurance

ExcessGoldenParadise

Federal

Fishing

ForeignTax

Medical

Nonemployee

Other

Rents

Royalties

StateIncome

StateIncomeTax

☐ Clear VOID Indicators

600.00

Rents < \$600.00

Royalties < \$10.00

Other < \$600.00

Fishing < \$600.00

Nonemployee < \$600.00

Medical < \$600.00

Substitute < \$600.00

AttorneyFees < \$600.00

Begin

Cancel

8. *Click “**Yes**” to confirm filtered records to be marked **VOID** to confirm the filtered records to be marked VOID.*

Confirm

Filtered records will be marked VOID!

Okay to proceed?

Yes

No



## Delete VOIDED or BLANK 1099-NEC & 1099-MISC returns

You must delete the blank 1099-NEC & 1099-MISC returns. With the return that you want to delete in view, click on the [Delete] button.

**1099-MISC - INSTRUCT**

ID # 4 ☒ VOID ☐ CORRECT ☐ CORRECT ☐ FILE ☐ 1099

PAYER'S name, street address, city, state, ZIP code, and telephone number

AGENCY NAME  
AGENCY NAME LINE 2  
ADDRESS LINE 1  
ADDRESS LINE 2  
CITY WA 98504  
Telephone: 360-407-8011

PAYER'S Federal ID Number 01-2345679 TIN Type SSN RECIPIENT'S ID Number 388347105

RECIPIENT'S name  
TRINH RENT TRAIN VENDOR 4  
17554 N LONESOME DOVE TRAIL  
Street address  
City SURPRISE State AZ Zip Code 85374 Zip Ext.

Account number Foreign ☐ CFSP USPS DP 2nd TIN ☐

15a Section 409A deferrals \$0.00 15b Section 409A income \$0.00

State 1 17 State #1 ID number 16 State 1 tax withheld \$0.00 18 State 1 income \$0.00  
State 2 17 State #2 ID number 16 State 2 tax withheld \$0.00 18 State 2 income \$0.00

1 Rents \$50.00 OMB No. 2010-0001  
2 Royalties \$0.00  
3 Other income \$0.00 4 Federal income tax withheld \$0.00  
5 Fishing boat proceeds \$0.00 6 Medical and health care \$0.00  
7 Nonemployee compensation \$0.00 8 Substitute payments... \$0.00  
9 Payer made direct sales of \$5000 or more of consumer products to a buyer (recipient) for resale => ☐ 10 Crop insurance proceeds \$0.00  
11 Excess golden parachute \$0.00 12 Gross proceeds to attorney \$0.00  
13 Excess golden parachute \$0.00 14 Gross proceeds to attorney \$0.00

B-Notice

Click on [Delete] button to delete void or blank return

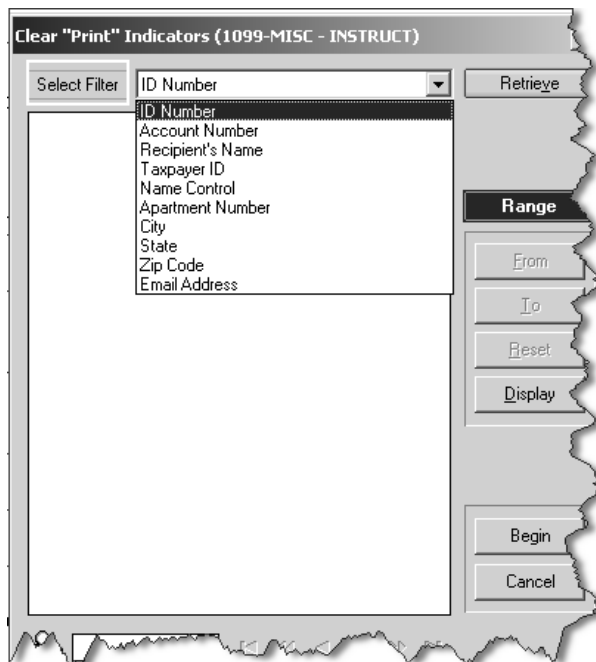
You do not have to delete the returns that have been marked **Void**. When a return that has been marked Void, the return will automatically **not print**, even if the Printed flag is unchecked. However, if you would like to delete the VOID return to clean up your returns, you can delete the VOID returns.

## Clear PRINTED flag



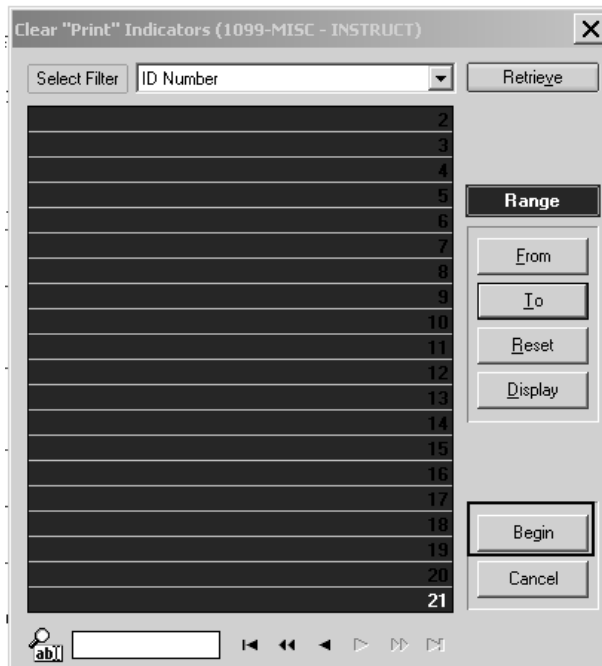
You will want to **Clear Printed** flag for all 1099-NEC & 1099-MISC that you want OFM to print and mail to your recipients on your behalf.

1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency.
3. Click "**Tools**" and then "**Clear Print Indicators**"
4. **Select Filter** to retrieve data. For example, ID Number

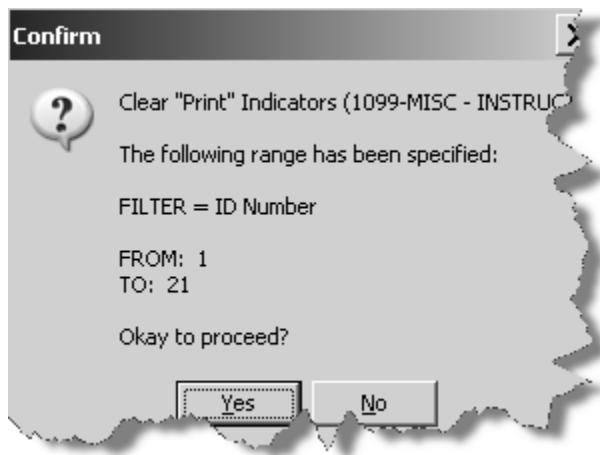


5. Click **"Retrieve"**
6. *Highlight* the ID Number to start, for example, "1" and *click* **"From"**
7. Using the arrow with a bar (locate at the bottom of the "Clear Print Indicator dialogue" to navigate to the last ID Number and highlight it, i.e. "21" and *click* **"To"**

8. Once the range of data to initiate action is selected, *click* **“Begin”**



9. *Click* **“Yes”** to confirm **Clear “Print”** Indicators



## 10. Make a note of **Printed flag unchecked**

**1099-MISC - INSTRUCT**

☐ VOID 
 ☐ CORR (G) 
 ☐ CORR (C) 
 ☒ Efile 
 ☒ 1096 
 ☐ Printed

ID # 1  
 PAYER'S name, street address, city, state, ZIP code, and telephone number  
 AGENCY NAME  
 AGENCY NAME LINE 2  
 ADDRESS LINE 1  
 ADDRESS LINE 2  
 CITY WA 98504  
 Telephone: 360-407-8011

PAYER'S Federal ID Number 01-2345679  
 TIN Type SSN  
 RECIPIENT'S ID Number 043758121

RECIPIENT'S name  
 TRINH RENT TRAIN VENDOR 1  
 6416 PACIFIC HWY E  
 Street address  
 City FIFE  
 State WA  
 Zip Code 98424  
 Zip Ext. 1561

Account number  
 Foreign ☐  
 CFSP  
 USPS DP  
 2nd TIN ☐

15a Section 409A deferrals \$0.00  
 15b Section 409A income \$0.00

State 1  
 State 2

1 Rents \$112,544.88  
 2 Royalties \$0.00  
 3 Other income \$0.00  
 5 Fishing boat proceeds \$0.00  
 7 Nonemployee compensation \$0.00  
 9 Payer made direct sales of \$5000 or more of consumer products to a buyer (recipient) for resale => ☐  
 11 Excess golden parachute \$0.00

OMB No. 1545-0047  
 4 Federal inc \$0.00  
 6 Medical and health care \$0.00  
 8 Substitute payments... \$0.00  
 10 Crop insurance proceeds \$0.00  
 12  
 14 Gross proceeds to attorney \$0.00  
 16 State 1 tax withheld \$0.00  
 16 State 2 tax withheld \$0.00

18 State 1 income \$0.00  
 18 State 2 income \$0.00

Mail:  Browse

**20 Printed flag unchecked**

B-Notice

## Check OFM/IRS Due Date Calendar

Please check **OFM/IRS Due Date Calendar** for 1099-NEC & 1099-MISC for date when OFM will start PRINTING & MAILING your agencies' 1099-NEC & 1099-MISC

1. OFM is responsible for printing and mailing of your 1099-NEC & 1099-MISC forms.
2. Check the “**1099-NEC & 1099-MISC Processing Schedule for Reporting Year 2020**” calendar – Pay attention to the due date for making changes to 1099-NEC & 1099-MISC data in Account Ability.
3. Prior to cut-off date, Agency needs to make sure that the forms are ready for printing and mailing.
4. How does Agency ensure that forms are ready for printing by cut-off date?  
**Uncheck “Printed”** flag is the key – these forms are ready for printing and mailing.
5. Agency can *uncheck* one by one through navigation of each form.
6. Agency can also use the Tools menu, *select* “**Clear Print Indicators...**” option to clear the Printed flag for all forms.



7. **Assumption:** the forms are ready for printing and mailing. Nothing more that you need to do to the forms.
8. **OFM is responsible for printing and mailing of Agencies' 1099-NEC & 1099-MISC forms.**

On print date, OFM will access Account Ability to extract all agencies' data and submit to the Printer for print. DES Consolidated Mail Services (CMS) will mail the 1099-NEC & 1099-MISC forms to the Recipient address on the 1099-NEC & 1099-MISC forms.

Please ensure that all Recipients' on the 1099-NEC or 1099-MISC forms have an address with a valid **zip code**.

### Print a selected 1099-NEC & 1099-MISC form

1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency
3. Locate the 1099-NEC & 1099-MISC that you wish to print by using the navigation arrows from the toolbar (located to the right of your Account Ability session).



Home



Left



Right



End

4. The "Printed" box at the top of the 1099 form needs to be **unchecked** and the selection **saved**.
5. *Click* on "**File**" to open up the dropdown menu

6. Click on **Print Forms for Selected Record** and you will receive the following message:
  - a. You are requesting to print forms for the selected recipient only. Okay to Proceed?
    - i. Yes – allows you to proceed
    - ii. No – returns you to the 1099-NEC & 1099-MISC forms

Click **“Yes”** to proceed.

Note if you are unable to select on any of the print options, please save any pending changes.

7. The **Print Setup** screen will be visible. From this screen, **locate your printer** in the NAME dropdown and *select* it.

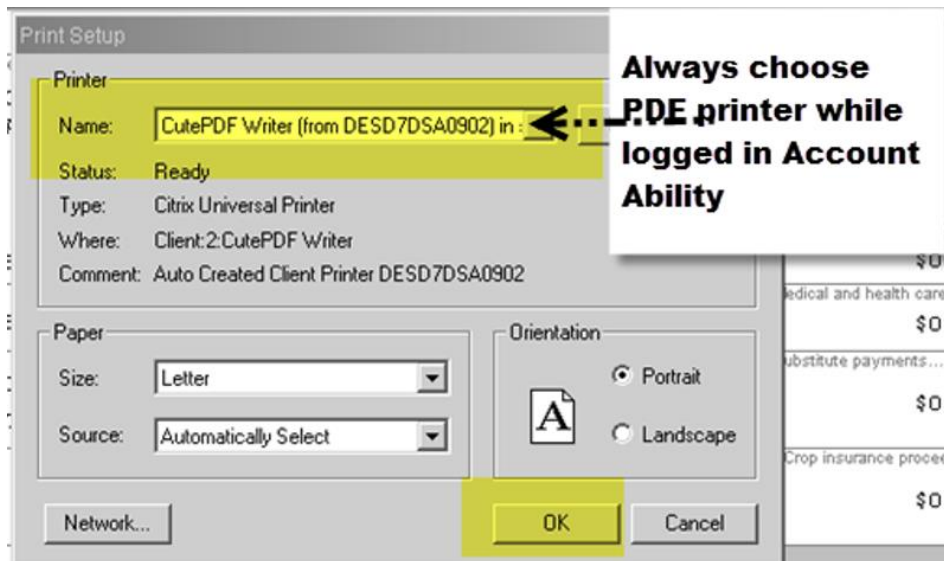
**CAREFUL CONSIDERATION** – All printers in Agency’s building will be in the NAME dropdown list. Please be careful in your selection of printer.

The printer names show up may look similar to your printer but may not actually be your printer.

Please be careful that you are **selecting your printer**. Selecting someone else’s printer will result in your 1099-NEC or 1099-MISC forms printed at an unintended printer.

OFM strongly suggests that you setup Print in Account Ability to print using **PDF Writer or Adobe PDF**. Selecting PDF will enable to save the form in a secure location (for example a secure network folder or your secure computer) and print the specific 1099-NEC & 1099-MISC form from that secure location.

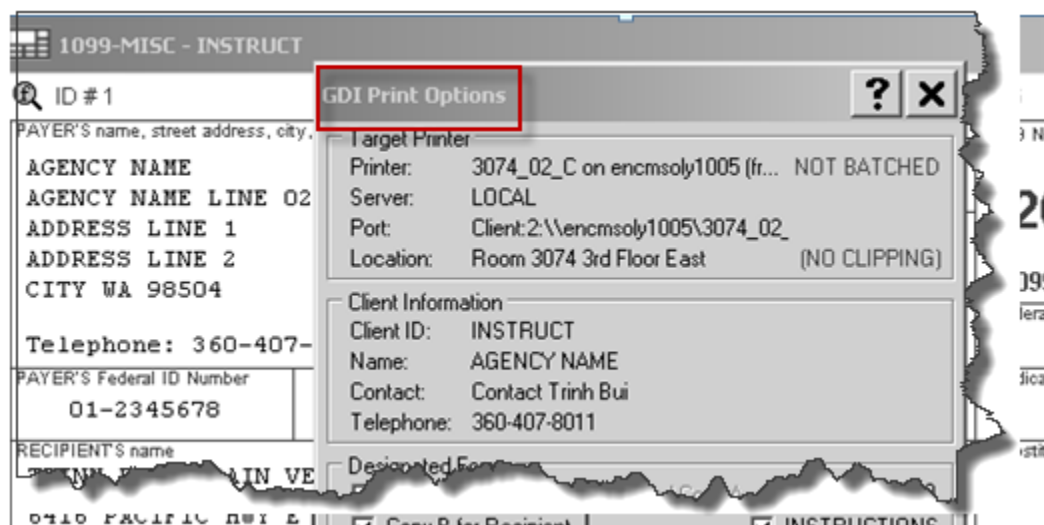




Printing a form from the server has risk, as indicated above.

8. Click **OK**.
9. You now have the **GDI Print Options** screen displayed.

Please verify again that your **Printer** selection is CutePDF Writer or Adobe PDF



10. In the **Designated Forms**, select the type of form you wish to print.

For example, if you need to reprint a **Copy B for Recipient**, put a check mark in this selection box.

The required form for recipient would be COPY B FOR RECIPIENT. Agency has the option to choose Copy C for Payer to keep on file. Note: Do not select any of the other form.

**GDI Print Options**

Target Printer  
Printer: 4263\_02\_C on despsoly010 (fro... **NOT BATCHED**  
Server: LOCAL  
Port: Client:2:\\despsoly010\\4263\_02\_C  
Location: Room 4263 4th Floor West **(NO CLIPPING)**

Client Information  
Client ID: INSTRUCT  
Name: AGENCY NAME  
Contact: Contact Trinh Bui  
Telephone: 360-407-8011

**Designated Forms**

☐ Preprinted 1099-MISC ☒ Fed Copy A 0.00 0.00  
☒ Copy B for Recipient ☐ INSTRUCTIONS  
☐ Copy C for Payer ☐ INSTRUCTION  
☐ N/A  
☐ Copy 1 for State Tax Department  
☐ Copy 2 for Recipient's State Return  
☐ N/A ☐ Pressure Seal  
☐ Summary 1096 ☐ Info Copy 0.00 0.00  
☐ Mark as printed ☐ SSA Approved  
☐ Truncate social security numbers [ SINGLE RECORD ]

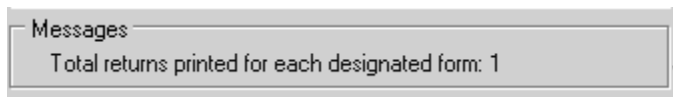
Messages

0% ? Help Print Close

11. Click **Print**

If COPY B FOR RECIPIENT selected in the Designated Forms, the **“Copy B For Recipient”** would print.

12. Make a note of the Messages and total returns printed.

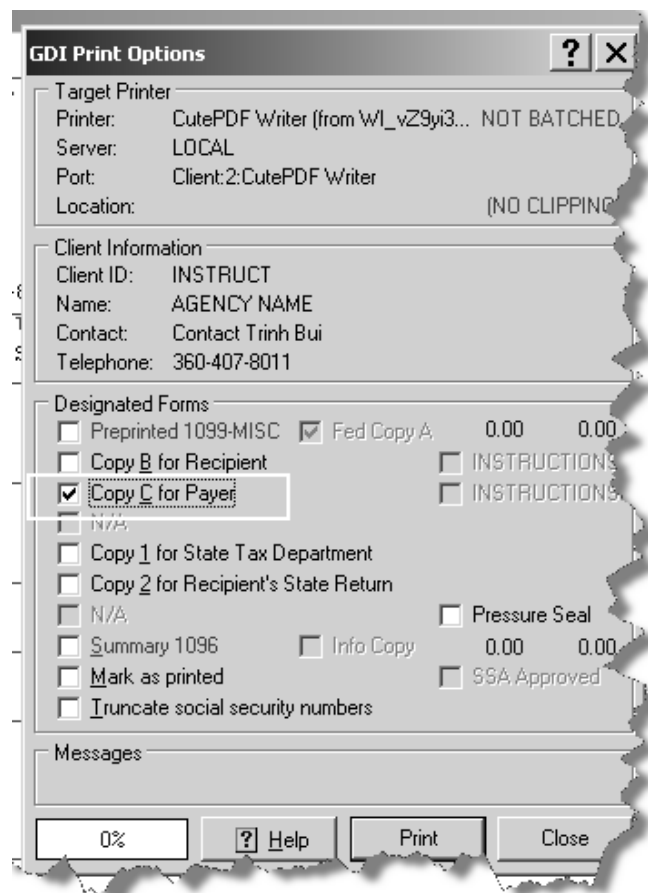


Messages  
Total returns printed for each designated form: 1

Click **Close**

### Print “Copy C for Payer”

1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency
3. Click on “**File**” to open up the dropdown menu.
4. Click “**Print Forms**”
5. The “**Print Setup**” dialogue box will be visible. From this screen, **locate your printer** in the NAME dropdown and *select* it.
6. Click “**OK**”
7. You now have the “**GDI Print Options**” dialogue box. Check “**Copy C for Payer**”



**GDI Print Options** [?] [X]

Target Printer  
Printer: CutePDF Writer (from 'WI\_vZ9yi3... NOT BATCHED  
Server: LOCAL  
Port: Client:2:CutePDF Writer  
Location: (NO CLIPPING)

Client Information  
Client ID: INSTRUCT  
Name: AGENCY NAME  
Contact: Contact Trinh Bui  
Telephone: 360-407-8011

Designated Forms

<input type="checkbox"/> Preprinted 1099-MISC	<input checked="" type="checkbox"/> Fed Copy A	0.00	0.00
<input type="checkbox"/> Copy B for Recipient	<input type="checkbox"/> INSTRUCTIONS		
<input checked="" type="checkbox"/> Copy C for Payer	<input type="checkbox"/> INSTRUCTIONS		
<input type="checkbox"/> N/A			
<input type="checkbox"/> Copy 1 for State Tax Department			
<input type="checkbox"/> Copy 2 for Recipient's State Return			
<input type="checkbox"/> N/A			
<input type="checkbox"/> Summary 1096	<input type="checkbox"/> Info Copy	0.00	0.00
<input type="checkbox"/> Mark as printed	<input type="checkbox"/> SSA Approved		
<input type="checkbox"/> Truncate social security numbers			

Pressure Seal

Messages

0% [?] Help Print Close

8. Click **"Print"** -

The Messages box will display 100% completion and total returns printed for each designated form: 21

**GDI Print Options**

Target Printer  
Printer: Client\OFM10999#\despsoly0... NOT BATCHED  
Server: LOCAL  
Port: Client\OFM10999#\despsoly010'  
Location: Room 4263 4th Floor West (NO CLIPPING)

Client Information  
Client ID: INSTRUCT  
Name: AGENCY NAME  
Contact: Contact Trinh Bui  
Telephone: 360-407-8011

Designated Forms

<input type="checkbox"/> Preprinted 1099-MISC	<input checked="" type="checkbox"/> Fed Copy A	0.00	0.00
<input type="checkbox"/> Copy B for Recipient	<input type="checkbox"/> INSTRUCTIONS		
<input type="checkbox"/> Copy C for Payer	<input type="checkbox"/> INSTRUCTIONS		
<input type="checkbox"/> N/A			
<input type="checkbox"/> Copy 1 for State Tax Department			
<input type="checkbox"/> Copy 2 for Recipient's State Return			
<input type="checkbox"/> N/A	<input type="checkbox"/> Pressure Seal		
<input type="checkbox"/> Summary 1096	<input type="checkbox"/> Info Copy	0.00	0.00
<input type="checkbox"/> Mark as printed	<input type="checkbox"/> SSA Approved		
<input type="checkbox"/> Truncate social security numbers			

Messages  
Total returns printed for each designated form: 21

100% ? Help Print Close

**Careful consideration:** Note that if 21 forms printed (as illustrated in the training examples). What this mean is that it is printing all forms created, even those that may not meet the dollar amount threshold.

If 16 forms were printed, this means that you have filtered the amount threshold and “VOID” those forms not meeting the dollar amount threshold.

**GDI Print Options**

Target Printer  
Printer: CutePDF Writer (from OFM10999... NOT BATCHED  
Server: LOCAL  
Port: Client:2:CutePDF Writer  
Location: (NO CLIPPING)

Client Information  
Client ID: INSTRUCT  
Name: AGENCY NAME  
Contact: Contact Trinh Bui  
Telephone: 360-407-8011

Designated Forms

<input type="checkbox"/> Preprinted 1099-MISC	<input checked="" type="checkbox"/> Fed Copy A	0.00	0.00
<input type="checkbox"/> Copy B for Recipient	<input type="checkbox"/> INSTRUCTIONS		
<input type="checkbox"/> Copy C for Payer	<input type="checkbox"/> INSTRUCTIONS		
<input type="checkbox"/> N/A			
<input type="checkbox"/> Copy 1 for State Tax Department			
<input type="checkbox"/> Copy 2 for Recipient's State Return			
<input type="checkbox"/> N/A	<input type="checkbox"/> Pressure Seal		
<input type="checkbox"/> Summary 1096	<input type="checkbox"/> Info Copy	0.00	0.00
<input type="checkbox"/> Mark as printed	<input type="checkbox"/> SSA Approved		
<input type="checkbox"/> Truncate social security numbers			

Messages  
Total returns printed for each designated form: 16

100% ? Help Print Close

**What does "Preprinted 1099-MISC" look like?**

RECIPIENT'S ID Number 043758121		
NAME CTRL		
State WA	Zip Code 98424	Zip Ext. 1561
Foreign CFSP	USPS DP	2nd TIN
in 409A income \$0.00		State 1 State 2

**GDI Print Options**

Target Printer  
Printer: Adobe PDF  
Server: LOCAL  
Port: Documents\\*.pdf  
Location:

Client Information  
Client ID: AGENCYID  
Name: AGENCY NAME  
Contact:  
Telephone: 360-407-8011

Designated Forms  
☒ Preprinted 1099-MISC ☒ Fed C  
☐ Copy B for Recipient  
☐ Copy C for Payer  
☐ N/A  
☐ Copy 1 for State Tax Department  
☐ Copy 2 for Recipient's State Return  
☐ N/A  
☐ Summary 1096 ☐ Info C  
☐ Mark as printed  
☐ Truncate social security numbers

**sample of Pre-printed Form selection**

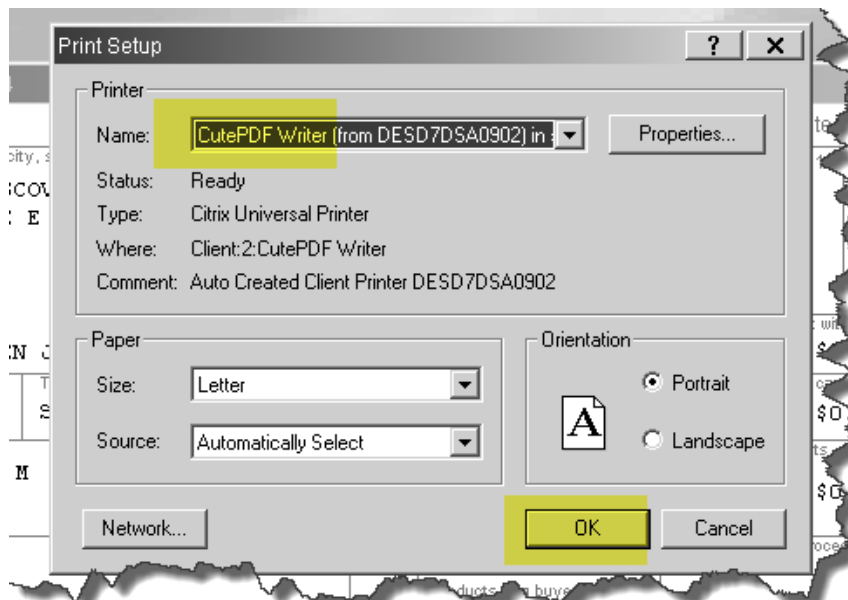
AGENCY NAME  
AGENCY NAME LINE 02 112544.88  
ADDRESS LINE 1  
ADDRESS LINE 2  
CITY WA 98504  
Telephone: 360-407-8011  
01-2345678 04-3758121  
TRINH TRAINING VENDOR 1  
6416 PACIFIC HWY E  
FIFE WA 98424-1561

## Run the Print Summary 1096 Report

1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency
3. Click on **"File"** to open up the dropdown menu.
4. Select **"Print Forms"**
5. The **[Print Setup]** dialogue will open up. Please select a **PDF Writer option** and click **[Ok]**.

If you do not have a PDF Writer option, please contact your Agency IT staff to assist in installing a PDF Writer option.

If your computer does not have a PDF Writer option, please do not attempt to print any document from 1099 Account Ability that may have Recipient's confidential information.







If amount threshold was not set to VOID those less than threshold amount, and you've "Rollup" records, you should have 21 returns.

**Summary 1096**

AGENCY NAME  
AGENCY NAME LINE 02

ADDRESS LINE 1  
ADDRESS LINE 2

CITY WA 98504

Contact Trinh Bui                      360 407-8011

01-2345678

21

7999999.80

Total returns created by client

Total Dollars

If you have **VOID** the forms that has amount less than threshold, you should see **16** returns for your Client ID.

AGENCY NAME  
AGENCY NAME LINE 02

ADDRESS LINE 1  
ADDRESS LINE 2

CITY WA 98504

Contact Trinh Bui                      360 407-8011

01-2345678

16

7998943.30

## Run the Print Summary 1096 Report (Information copy)

This is another Summary 1096 version of the summary 1096.

- Put a checkmark on the “**Summary 1096**” to select this Designated Form” and a checkmark next to “Info Copy”.

The screenshot shows the 1099-MISC - INSTRUCT form and the GDI Print Options dialog box. The form contains the following information:

- Agency Name: AGENCY NAME
- Address Line 1: ADDRESS LINE 1
- Address Line 2: ADDRESS LINE 2
- City: WA 98504
- Telephone: 360-407-8011
- Payer's Federal ID Number: 01-2345679
- TIN Type: SSN
- Recipient's Name: TRINH RENT TRAIN VENDOR 1
- Street Address: 6416 PACIFIC HWY E
- City: FIFE
- State: WA
- Account Number: [blank]
- Foreign: [blank]
- CFSP: [blank]
- 15a Section 409A deferrals: \$0.00
- 15b Section 409A income: \$
- E-Mail: [blank]

The GDI Print Options dialog box is open, showing the following options:

- Target Printer: CutePDF Writer (from DESD7DS... NOT BATCHED)
- Server: LOCAL
- Port: Client:2:CutePDF Writer
- Location: (NO CLIPPING)
- Client Information: Client ID: INSTRUCT, Name: AGENCY NAME, Contact: Contact Trinh Bui, Telephone: 360-407-8011
- Designated Forms:
  - ☐ Preprinted 1099-MISC
  - ☒ Fed Copy A
  - ☐ Copy B for Recipient
  - ☐ Copy C for Payer
  - ☐ N/A
  - ☐ Copy 1 for State
  - ☐ Copy 2 for Recipient's State Return
  - ☒ Summary 1096
  - ☐ Mark as printed
  - ☐ Truncate social security numbers
- Instructions:
  - ☐ INSTRUCTIONS
  - ☐ INSTRUCTIONS
  - ☐ INSTRUCTIONS
  - ☐ Pressure Seal
  - ☐ SSA Approved
- Messages: [blank]

The "Summary 1096" and "Info Copy" options are highlighted with a red box. The "Info Copy" option is checked.

If amount threshold was not set to VOID those less than threshold amount, and you've "Rollup" records, you should have 21 forms.

<b>INFORMATION COPY - DO NOT FILE WITH IRS</b>													
Form <b>1096</b> Department of the Treasury Internal Revenue Service		<b>Annual Summary and Transmittal of U.S. Information Returns</b>										OMB No. 1545-0108 <b>YYYY</b>	
FILER'S Name and Address  <b>AGENCY NAME</b> <b>AGENCY NAME LINE 02</b> <b>ADDRESS LINE 1</b> <b>ADDRESS LINE 2</b> <b>CITY WA 98504</b>										<b>INFORMATION COPY - DO NOT FILE WITH IRS</b>			
Name of person to contact <b>Contact Trinh Bui</b>						Telephone number <b>360-407-8011</b>							
Email address						Fax number							
<b>1</b> Employer ID number <b>01-2345678</b>		<b>2</b> Social security number		<b>3</b> Total no. of forms <b>21</b>		<b>4</b> Federal tax withheld		<b>5</b> Total reported with this 1096 <b>7999999.80</b>					
<b>6</b> Enter an "X" in only one box below to indicate the type of form being filed.													
W-2G	1097-BTC	1098	1098-C	1098-E	1098-T	1099-A	1099-B	1099-C	1099-CAP	1099-DIV	1099-G	1099-H	1099-INT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1099-K	1099-LTC	1099-MISC	1099-OID	1099-PATR	1099-Q	1099-R	1099-S	1099-SA	3921	3922	5498	5498-ESA	5498-SA
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>7</b> If this is your final return, enter an "X" here . . . . . <input type="checkbox"/>													
<b>THIS IS AN INFORMATION COPY - DO NOT FILE THIS COPY WITH THE INTERNAL REVENUE SERVICE.</b>													

If you have **VOID** the forms that has amount less than threshold, you should see 16 returns for your Client ID.

<b>INFORMATION COPY - DO NOT FILE WITH IRS</b>														
Form <b>1096</b> Department of the Treasury Internal Revenue Service		<b>Annual Summary and Transmittal of U.S. Information Returns</b>										OMB No. 1545-0108 <b>YYYY</b>		
FILER'S Name and Address  AGENCY NAME AGENCY NAME LINE 02 ADDRESS LINE 1 ADDRESS LINE 2 CITY WA 98504														
INFORMATION COPY - DO NOT FILE WITH IRS														
Name of person to contact <b>Contact Trinh Bui</b>							Telephone number <b>360-407-8011</b>							
Email address							Fax number							
1 Employer ID number <b>01-2345678</b>			2 Social security number			3 Total no. of forms <b>16</b>			4 Federal tax withheld			5 Total reported with this 1096 <b>7998943.30</b>		
6 Enter an "X" in only one box below to indicate the type of form being filed.														
W-2G	1097-BTC	1098	1098-C	1098-E	1098-T	1099-A	1099-B	1099-C	1099-CAP	1099-DIV	1099-G	1099-H	1099-INT	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1099-K	1099-LTC	1099-MISC	1099-OID	1099-PATR	1099-Q	1099-R	1099-S	1099-SA	3921	3922	5498	5498-ESA	5498-SA	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>THIS IS AN INFORMATION COPY - DO NOT FILE THIS COPY WITH THE INTERNAL REVENUE SERVICE.</b>														

**Important NOTE:** Please **do not** mail this Summary 1096 to the IRS. This is for your information only. OFM will electronically file your returns to the IRS on your behalf. For this reason, you do not need to mail a summary 1096 to the IRS.

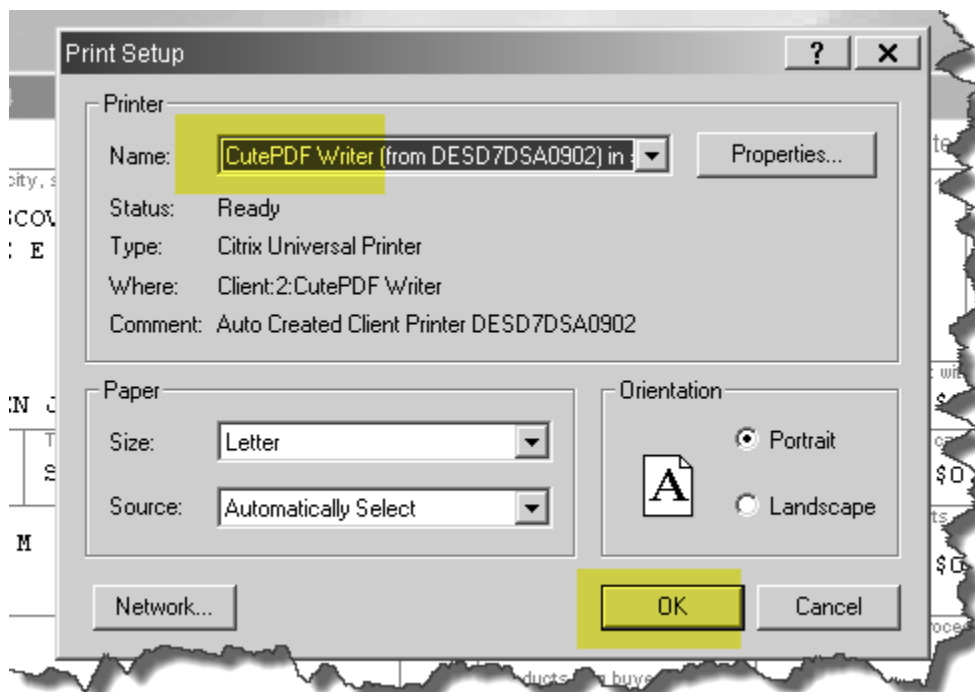
## Run the Print Control Report

“**Print Control Report**” list all the 1099-NEC & 1099-MISC forms for your agency.

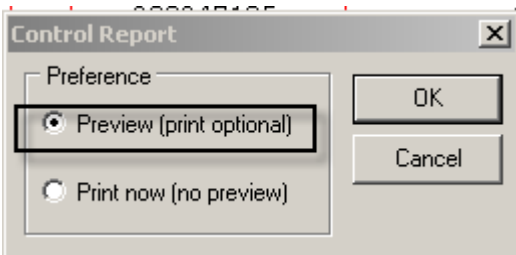
1. Open up your **Client Agency**
2. Open the **1099-NEC & 1099-MISC** forms for your agency
3. Click on “**File**” to open up the dropdown menu
4. Select “**Control Report**”
5. The [**Print Setup**] dialogue will open up. Please select a **PDF Writer option** and click [**Ok**].

If you do not have a PDF Writer option, please contact your Agency IT staff to assist in installing a PDF Writer option.

If your computer does not have a PDF Writer option, please do not attempt to print any document from 1099 Account Ability that may have Recipient's confidential information.



6. Select your Control Report Preference

<p>Preview (print optional)</p> 	<p>OFM recommend that you select the <b>“Preview (print optional)”</b> first.</p> <p>This option will give you an opportunity to validate that you have selected your printer.</p>
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You will have the option to check the box to truncate social security numbers.

Reminder: Please do not print from 1099 Account Ability if you do not have PDF Writer option on your computer.

7. Click **OK**

## 1099-MISC Control Report (2013)

01/15/13 10:52:22 AM

AGENCY NAME (INSTRUCT)

Taxpayer ID 01-2345678

Sorted by Natural Order

Name	Name and Address	Taxpayer ID	Boxes 1-10, 13-15, State Income and Withholding			
TRINH RENT TRAIN VENDOR 1 6416 PACIFIC HWY E  FIFE WA 98424-1561		043-75-8121	Box 1	112,544.88	Box 7	0.00
			Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
			Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	0.00
			Box 15a	0.00	Box 15b	0.00
				0.00		0.00
				0.00		0.00
TRINH RENT TRAIN VENDOR 2 DBA MARTIN SELIG REAL ESTATE C/O NORTHERN TRUST BANK FSB 1414 4TH AVE SEATTLE WA 98101-2202		203-74-8058	Box 1	5,437,137.20	Box 7	0.00
			Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
			Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	0.00
			Box 15a	0.00	Box 15b	0.00
				0.00		0.00
				0.00		0.00
TRINH RENT TRAIN VENDOR 3 1612 S MILDRED ST STE B  TACOMA WA 98406-0512		270-08-0977	Box 1	18,683.90	Box 7	0.00
			Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
			Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	0.00
			Box 15a	0.00	Box 15b	0.00
				0.00		0.00
				0.00		0.00
TRINH RENT TRAIN VENDOR 4 17554 N LONESOME DOVE TRAIL  SURPRISE AZ 85374		388-34-7105	Box 1	50.00	Box 7	0.00
			Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
			Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00
			Box 6	0.00	Box 9	0.00
			Box 15a	0.00	Box 15b	0.00
				0.00		0.00
				0.00		0.00
TRINH RENT TRAIN VENDOR 5 7711 MARTIN WAY E  OLYMPIA WA 98516-5622		452-69-7705	Box 1	348,626.52	Box 7	0.00
			Box 2	0.00	Box 8	0.00
			Box 3	0.00	Box 10	0.00
			Box 4	0.00	Box 13	0.00
			Box 5	0.00	Box 14	0.00